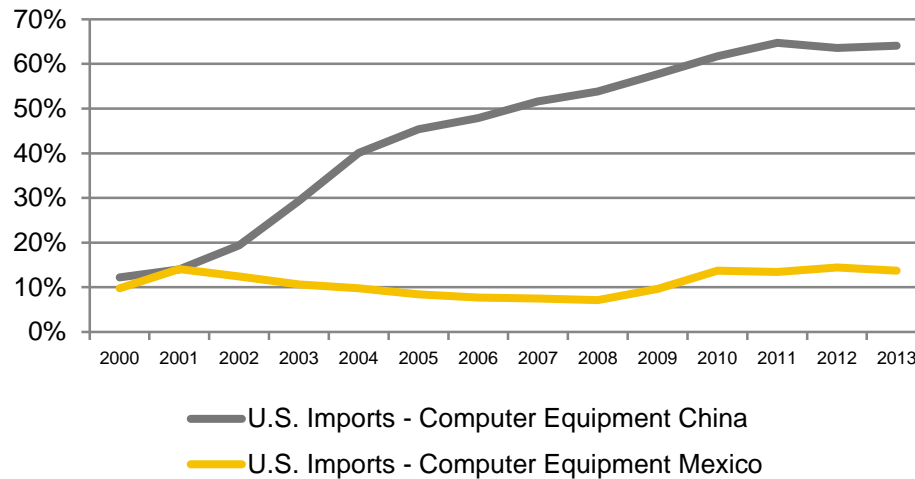


MEXICO/CHINA AND U.S. ELECTRONICS IMPORTS*

- Since China's admission to the WTO in 2001, Mexico's share of electronics imports to the U.S. has largely suffered. Its nadir was the 2008-2009 recession, but since then it has regained ground on China in certain sectors.
- Red/green arrows in the following charts indicate relative growth vs. China since 2008 (CAGR = compound annual growth rate)
- Despite being at near parity with China in semiconductor and electronic component manufacturing a decade ago, Mexico has since lost significant market share (although it has grown its dollar value of imports since 2008).
- Mexico's strongest positions are in electro-medical and audio-visual equipment. Since 2008 it has shown significant growth in computer and computer storage though its share is still quite low.

* U.S. General Imports retrieved from USITC database, April 2014

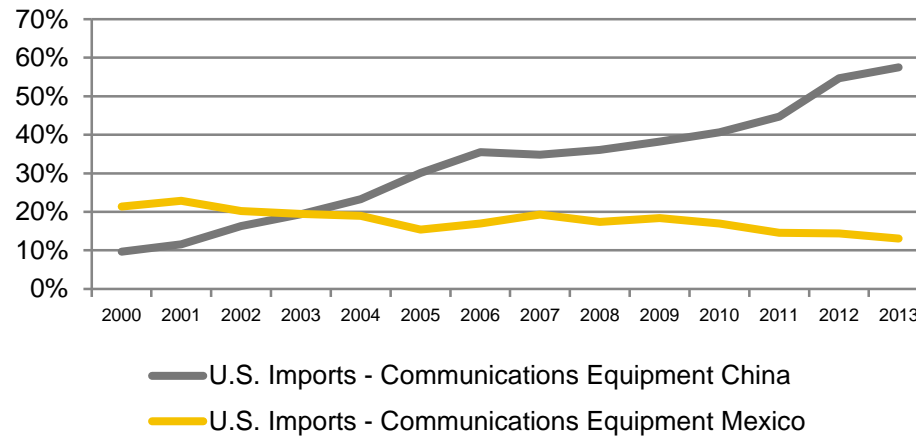
Market Share - Computer Equipment



- NAICS 3341 includes computers, computer storage/media, and other peripheral equipment manufacturing
- Mexico's market share increased over the period from **9.8%** to **13.7%** reaching a low of **7.1%** in 2008
- Mexico's CAGR in its value of U.S. imports was **5.6%** since 2000 and **15.6%** since 2008. By contrast, China's CAGR since 2008 was **6.7%**



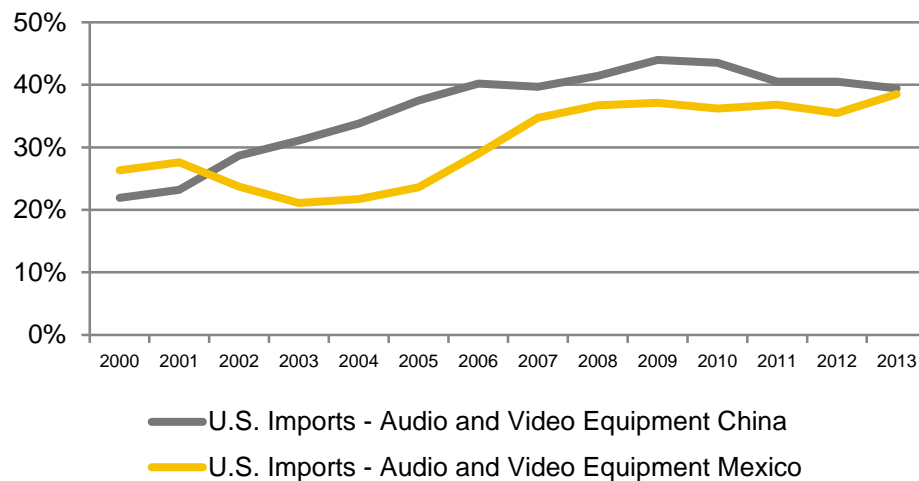
Market Share - Communications Equipment



- NAICS 3342 includes networking equipment, GPS, cellular phones, cable television receivers, and alarm systems
- Mexico's market share decreased over the period from **21.4%** to **13.1%** reaching a low of **13.1%** in 2013
- Mexico's CAGR in its value of U.S. imports was **5.1%** since 2000 and **0.65%** since 2008. By contrast, China's CAGR since 2008 was **14.0%**



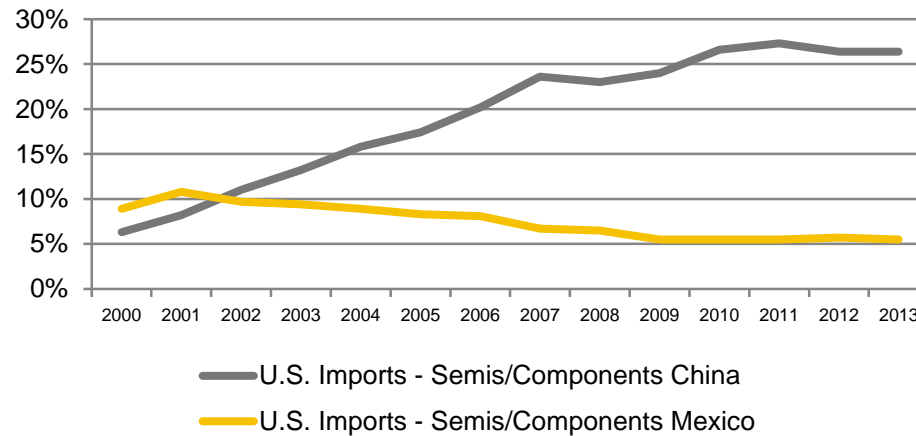
Market Share - Audio-Video Equipment



- NAICS 3343 includes televisions, DVD players, CD players, home theater equipment, and video cameras
- Mexico's market share increased over the period from **26.3%** to **38.5%** reaching a low of **21.1%** in 2003
- Mexico's CAGR in its value of U.S. imports was **4.2%** since 2000 and **-4.1%** since 2008. By contrast, China's CAGR since 2008 was **-5.7%**



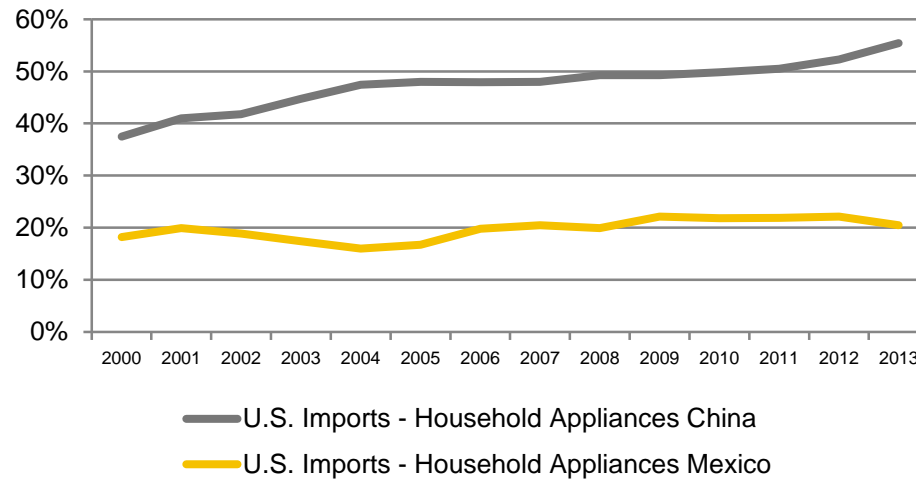
Market Share - Semiconductors/Components



- NAICS 3344 includes PCB, LED, semiconductor, transistor, connectors, and other related components
- Mexico's market share decreased over the period from **8.9%** to **5.5%** reaching a low of **5.5%** in 2013
- Mexico's CAGR in its value of U.S. imports was **-5.3%** since 2000 and **-2.8%** since 2008. By contrast, China's CAGR since 2008 was **2.3%**



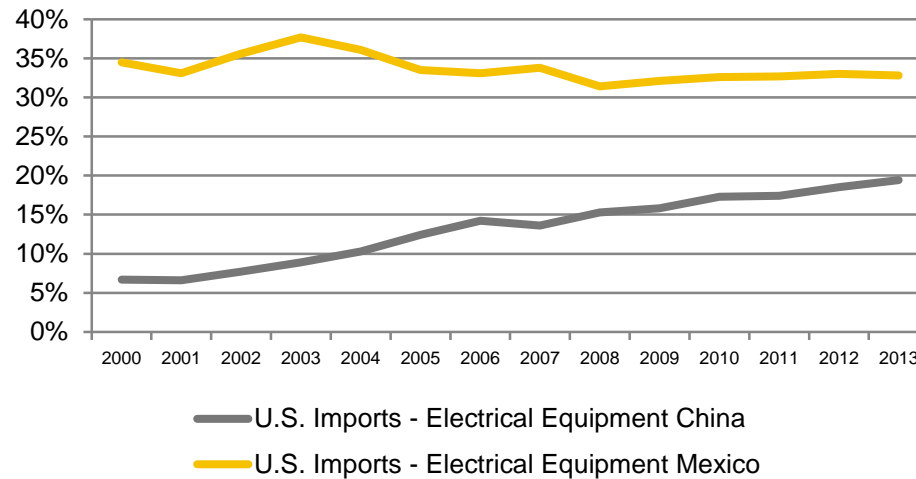
Market Share - Household Appliances



- NAICS 3352 includes vacuums, fans, heaters, ovens, refrigerators, microwaves, washers/dryers, etc.
- Mexico's market share increased over the period from **18.2%** to **20.5%** reaching a low of **16.0%** in 2004
- Mexico's CAGR in its value of U.S. imports was **7.6%** since 2000 and **3.8%** since 2008. By contrast, China's CAGR since 2008 was **5.3%**



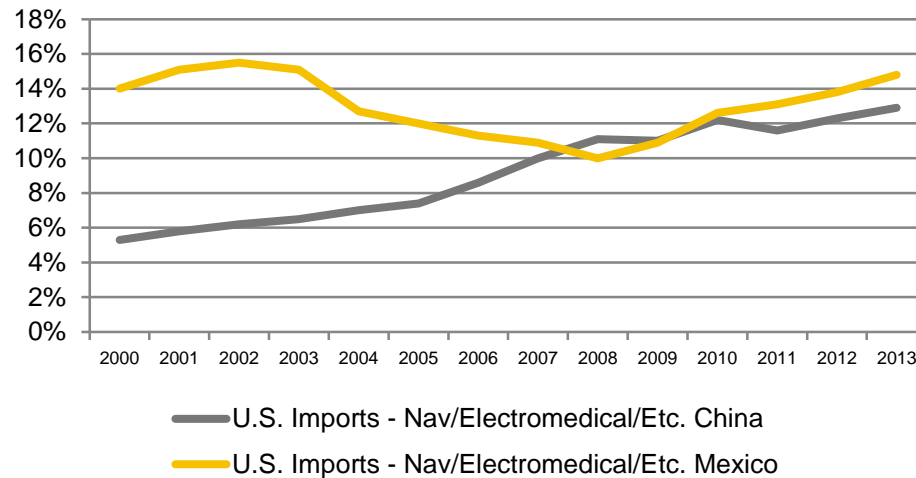
Market Share - Electrical Equipment



- NAICS 3353 includes lighting, transformers, voltage regulators, generators, motors, fuses, circuit breakers, etc.
- Mexico's market share decreased over the period from **34.5%** to **32.8%** reaching a low of **31.4%** in 2008
- Mexico's CAGR in its value of U.S. imports was **5.4%** since 2000 and **4.8%** since 2008. By contrast, China's CAGR since 2008 was **8.3%**



Market Share - Nav/Electromedical



- NAICS 3345 includes cardiographs, laser equipment, ultrasound, flight instruments, electron microscopes, etc.
- Mexico's market share increased over the period from **14.0%** to **14.8%** reaching a low of **10.0%** in 2008
- Mexico's CAGR in its value of U.S. imports was **6.4%** since 2000 and **10.3%** since 2008. By contrast, China's CAGR since 2008 was **5.9%**

